



# Workforce Planning Model Comparison Matrix

## **What is the Workforce Planning Model Comparison Matrix?**

The Workforce Planning Model Comparison Matrix assists departments in comparing CalHR's old Seven Step Workforce Planning Model with the updated five phase State of California Workforce Planning Model. The purpose of the Matrix is to ease departments' transition from the old to new model. Workforce Plans previously constructed under the Seven Step Model remain valid and do not need to be redeveloped under the new Model until the department is ready to update or compose a new workforce plan.

## **When should a department use the Workforce Planning Model Comparison Matrix?**

The Workforce Planning Model Comparison Matrix is meant for departments who have been utilizing the old model and would like to understand the differences between the old and new model.

## **Who should use the Workforce Planning Model Comparison Matrix?**

Departments who had previously aligned workforce planning efforts with the old model should utilize the Workforce Planning Model Comparison Matrix. The workforce planning Steering Committee, or individual(s) involved in workforce planning, would likely be the audience interested in reviewing the Matrix.

## **How does a department use the Workforce Planning Model Comparison Matrix?**

The Workforce Planning Model Comparison Matrix contains a step by step comparison between the old and new model. The Matrix provides a summary of the old Seven Step Model, similarities between the old and new model and elements found in the new Five Phase Model that were not contained in the Seven Step Model.

## **For Assistance**

Contact CalHR's Statewide Workforce Planning and Recruitment Unit at [wfp@calhr.ca.gov](mailto:wfp@calhr.ca.gov) or (916) 322-0742 with any questions or feedback on the Workforce Planning Model Comparison Matrix.

| Seven Step Model<br>(Summary)  | Similarities To Five Phase<br>Model   | Elements of Five Phase Model<br>Not Found in Seven Step Model   |
|--|---|---|
| <u>Step 1. Review Strategic Plan:</u> <ul style="list-style-type: none"> <li>Review your department's Strategic Plan mission, vision, and measurable goals and objectives, and timeframes for accomplishing them</li> <li>Review strategic plan or perform SWOT analysis and Environmental Scan</li> <li>Obtain data on the entire organization and data related to outside factors that impact the organization to develop a trend analysis</li> <li>Meet with key stakeholders to introduce workforce planning and steps that will be followed during the planning effort and their roles and responsibilities</li> </ul>  | <ul style="list-style-type: none"> <li>Alignment to strategic direction of the department</li> <li>Compiling a steering committee</li> <li>Identifying trends using internal and external data</li> <li>Introducing workforce planning to stakeholders</li> </ul> | <ul style="list-style-type: none"> <li>Guidance for departments with limited resources</li> <li>Instruction about how to secure executive support</li> <li>Specific sources for internal and external data</li> <li>Formal steering committee, prescribed roles and responsibilities</li> <li>Tools/resources identified to assist in completing the deliverable</li> </ul> |
| <u>Step 2. Identify Work Functions:</u> <ul style="list-style-type: none"> <li>Identify the work functions that must be performed in order to accomplish the Strategic Plan.</li> <li>For the entire organization, determine: Work functions to be increased, decreased, or discontinued; Changes to organization's structure and/or flow of work</li> </ul>   | <ul style="list-style-type: none"> <li>Identifying work functions that are critical to meet strategic missions</li> <li>Anticipating changes in workforce needs</li> </ul>  | <ul style="list-style-type: none"> <li>Emphasizes using input directly from division/ program leaders to determine anticipated changes</li> <li>Tools/resources identified to assist in completing the deliverable</li> </ul>   |
| <u>Step 3. Identify Staffing Requirements:</u> <ul style="list-style-type: none"> <li>Identify the staffing, both in number of staff and competencies required to accomplish the Work Functions.</li> <li>First focus on defining the competencies (i.e. skills, knowledge, abilities, and personal attributes) your staff must possess to successfully perform the functions identified in Step 2</li> <li>Second, determine the number of staff with those competencies that your organization will need to accomplish its functions</li> <li>Competencies can be defined organizationally or on an individual basis</li> <li>Decide whether your team will use leadership, technical, and/or core competencies and how they will be assessed</li> </ul> | <ul style="list-style-type: none"> <li>Identifying supply and competencies required in critical positions</li> <li>Competencies and assessment method to use</li> </ul>   | <ul style="list-style-type: none"> <li>Detailed methods to develop and assess competencies</li> <li>Tools/resources identified to assist in completing the deliverable</li> </ul>   |

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| <ul style="list-style-type: none"> <li>Assess competence levels of current staff</li> </ul> <p><u>Step 4. Project Workforce Supply:</u></p> <ul style="list-style-type: none"> <li>Project your workforce, including numbers of staff as well as competencies, taking into account attrition without factoring in any hiring</li> <li>Develop a profile of your current workforce which includes:               <ul style="list-style-type: none"> <li>Number of employees</li> <li>Key Competencies</li> <li>Classifications and salaries</li> <li>Age, gender, ethnicity</li> <li>Appointment status (permanent, temporary, etc.)</li> </ul> </li> <li>In order to determine your future workforce supply, average the results of the following calculations for each classification:               <ul style="list-style-type: none"> <li>Retirement/attrition factor: Total retired / Total in class</li> <li>Transfer factor: Total transferred / Total in class</li> <li>Retention/turnover factor: Total separated from state service / Total in class</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>Projecting your workforce</li> <li>Developing a profile of your current workforce</li> </ul> | <ul style="list-style-type: none"> <li>Updated workforce data analysis methodologies</li> <li>Emphasizes analyzing each classification</li> <li>Integrates division/ program input</li> <li>Detailed information about analyzing impact of demographics and separations on each classification</li> <li>Tools/resources identified to assist in completing the deliverable</li> </ul> |
| <p><u>Step 5. Analyze Workforce Gaps:</u></p> <ul style="list-style-type: none"> <li>Compare the Staffing Requirements in Step 3 with the Projected Workforce Supply in Step 4, and determine the gap</li> <li>Conduct a gap analysis. A gap analysis consists of:               <ul style="list-style-type: none"> <li>Assessment of the current supply of human capital,</li> <li>Factor in variables and assumptions, which include retirements, resignations, and transfers</li> <li>Also consider changes that you assume will occur, such as major projects that are planned, other changes that could cause you to need more or less workforce, or changes in availability of certain professions</li> <li>This information will help you determine future</li> </ul> </li> </ul>   | <ul style="list-style-type: none"> <li>Method for calculating workforce gaps</li> </ul>   | <ul style="list-style-type: none"> <li>Describes how to analyze competency gaps by comparing assessment scores</li> <li>Detailed gap analysis methodology integrating both supply and competency gap findings</li> <li>Refers to redirecting resources from surplus areas to gap areas</li> <li>Tools/resources identified to assist in completing the deliverable</li> </ul>         |

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|---|---|--|
| <p>demand</p> <ul style="list-style-type: none"> <li>To determine the gap, you subtract your current supply from your future demand</li> <li>Once you measure the extent of any gaps for each classification and competency set, identify where candidates will come from to fill those gaps</li> </ul>   |   |  |
| <p><u>Step 6. Develop Priorities and Implement Solutions:</u></p> <ul style="list-style-type: none"> <li>Analyze your workforce needs (the gap), establish priorities, and implement solutions for meeting those needs</li> <li>Brainstorm and prioritize solutions that resolve the major gaps identified</li> <li>Develop a description of each solution</li> <li>Establish roles, responsibilities, timeframes, performance measures</li> <li>Communicate the plan to stakeholders</li> <li>Involve change agents</li> <li>Follow project plan/timeline to implement the plan</li> </ul> | <ul style="list-style-type: none"> <li>Using gap analysis as basis for strategy development</li> <li>Establishing and following action plans with performance measures</li> <li>Communicating the plan</li> </ul> | <ul style="list-style-type: none"> <li>Comprehensive template to organize all aspects of the workforce plan</li> <li>Guidance for determining classification risk level and priorities</li> <li>Involves formal steering committee</li> <li>Examples of strategies</li> <li>New State of California Succession Planning Model to guide in development of succession planning strategies</li> <li>Description of knowledge types and mitigating barriers to knowledge transfer</li> <li>Tools/resources identified to assist in completing the deliverable</li> </ul> |
| <p><u>Step 7. Evaluate the Plan:</u></p> <ul style="list-style-type: none"> <li>Assess what's working and what's not. Make adjustments as needed. Address new workforce and organizational issues</li> <li>Once you implement solutions, evaluate your efforts in order to ensure: <ul style="list-style-type: none"> <li>You are meeting your objectives</li> <li>You are closing the workforce gaps</li> <li>Process improvements you have established as</li> </ul> </li> </ul>  | <ul style="list-style-type: none"> <li>Evaluating workforce plan and all workforce planning activities</li> </ul>   | <ul style="list-style-type: none"> <li>Tools/resources identified to assist in completing the deliverable</li> </ul>   |

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|---|-------------------------------------|---|
| <ul style="list-style-type: none"> <li>part of the plan are being constantly evaluate</li> <li>○ The cost effectiveness of the solutions</li> <li>○ A documented history of your workforce program is created and maintained</li> <li>○ That internal and external clients and the organization as a whole are benefiting from the program</li> </ul> |                                     |   |